



Survey of Likely June 2016 Bay Area Voters

Conducted for San Francisco Bay Restoration Authority



December 2015

Please note that due to rounding, some percentages may not add up to exactly 100%.

*Due to split sampling overall sample size may have been larger. Sample size above refers to the number of interviews testing parcel tax amount shown in this presentation.

Date	Universe	Number of Interviews*	Margin of Error	Polling Firm
December 4-14, 2015	Likely June 2016	1,505	±2.5%	EMC
April 1-12, 2015	Likely June 2016	416	±4.8%	FMS
Apr 30-May 2, 2014	Likely Nov. 2014	1,000	±3.1%	EMC
Jan 22-Feb 1, 2014	Likely Nov. 2014	900	±3.3%	FMS
May 9-16, 2013	Likely Nov. 2014	500	±4.4%	EMC
July 5-14, 2011	Likely Nov. 2012	1,500	±2.4%	EMC
Aug 10-18, 2010	Likely Nov. 2012	617	±4.0%	FMS
March 29-Apr 2, 2006	Likely Nov. 2006	500	±4.4%	EMC

- ◀ Telephone Survey of Bay Area Likely Voters
- ◀ Interviews conducted by trained, professional interviewers
- ◀ Respondents contacted on both landline and cell phones
- ◀ Where applicable, results compared with:

Methodology

Modeling a June Electorate

- ▶ The survey sample models likely June 2016 voters and estimates turnout in the 35% to 40% range.
- ▶ Voters were selected for the sample universe if they had voted in either the 2012 or 2014 primary election or are new registrants. Respondents were additionally screened for self-reported likelihood of voting in June.
- ▶ Geographic and demographic variables match the likely June electorate.

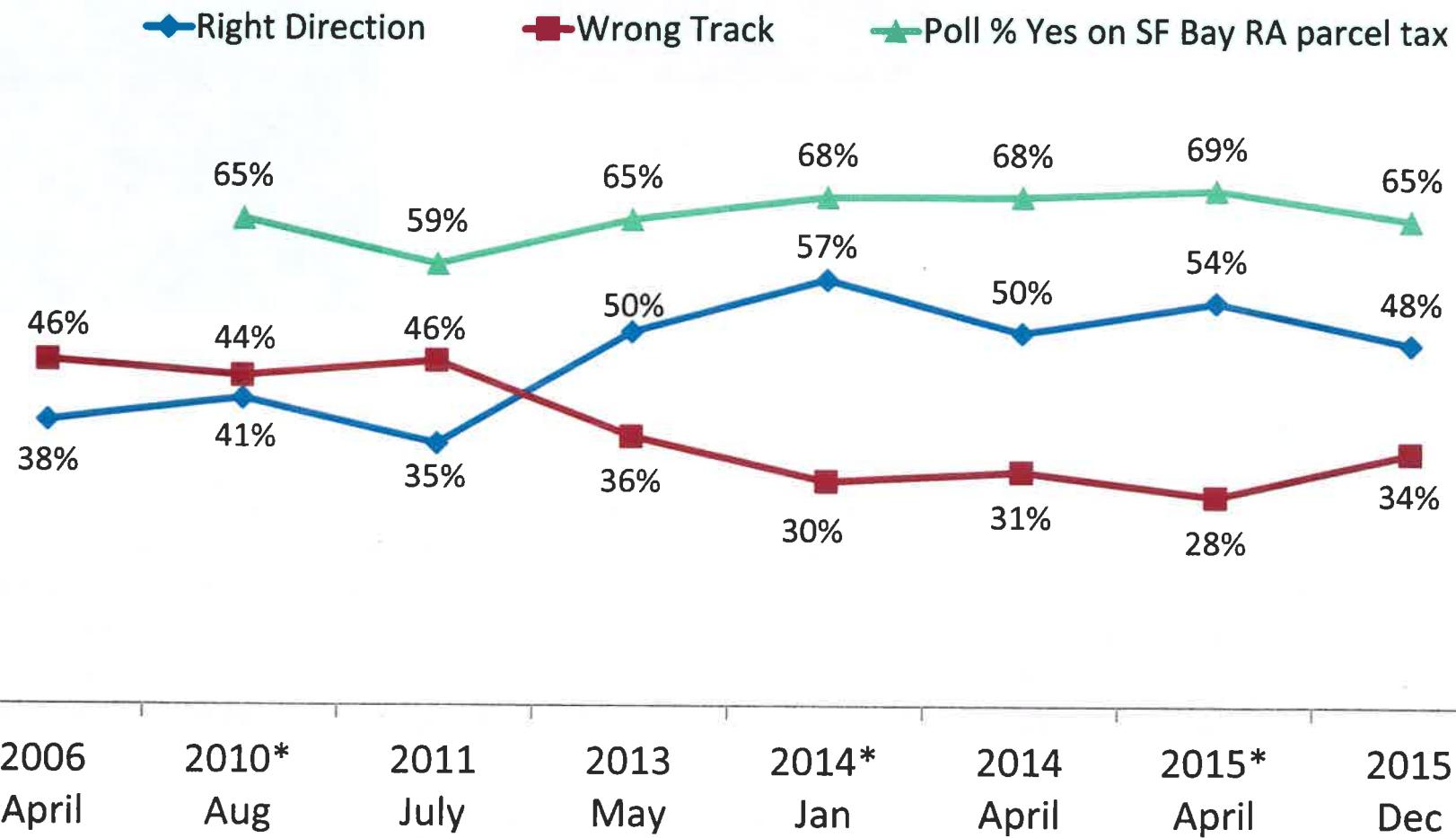


- ◀ Voter support for a proposed parcel tax to fund pollution prevention and habitat restoration in The Bay is very consistent with previous polling showing that passing a measure will be difficult, but doable. A strong majority of nine-county Bay Area voters are supportive of a proposed parcel tax after simply hearing the ballot question.
- ◀ While winning two-thirds support for a new tax is always challenging, providing voters with a short statement about the benefits of the measure pushes support beyond the two-thirds threshold needed for approval.
- ◀ Although overall optimism is down slightly, voters continue to feel positive about the direction of the Bay Area, and optimism is, and has been over the years, closely tied to support for the proposed parcel tax.

Key Findings

Bay Area Right Direction/Wrong Track

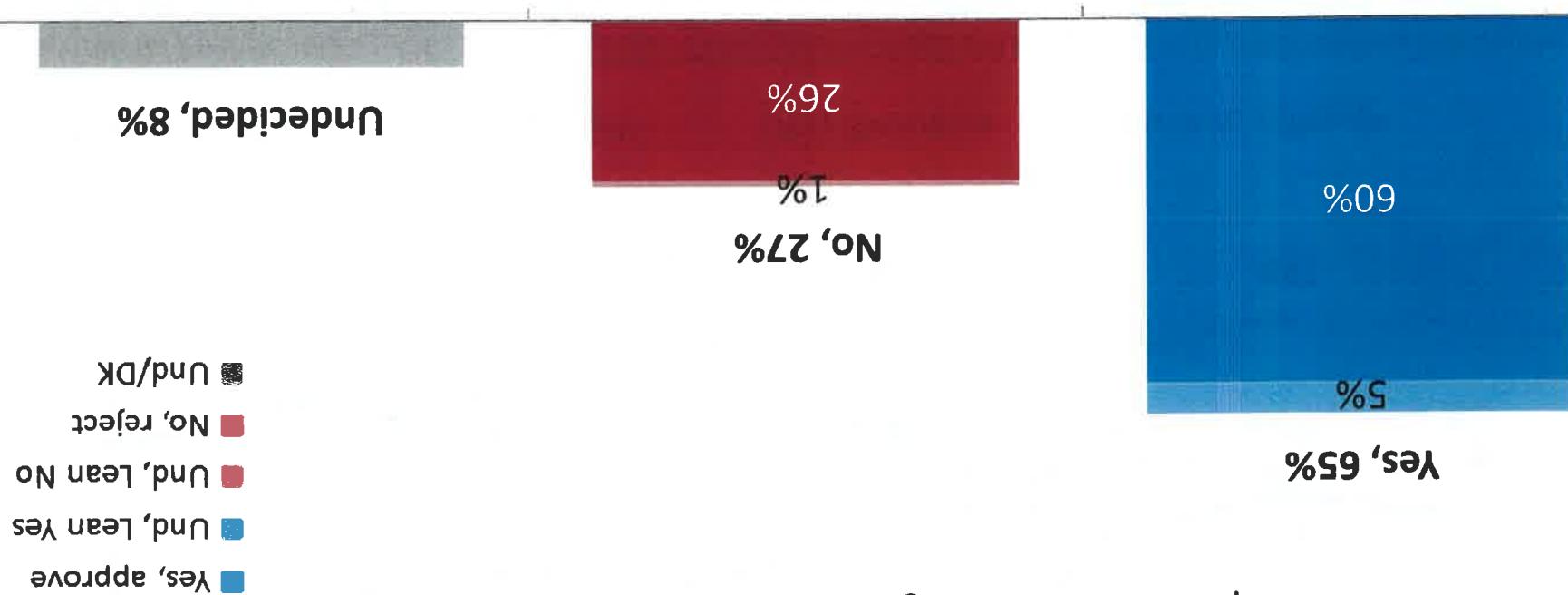
Since the end of the recession, Bay Area voters have been feeling more optimistic than pessimistic about the direction of the area. Optimism has been closely tied to support for the proposed measure.



* Poll conducted by FM3

Q4. Do you feel that things in the Bay Area are generally going in the right direction or do you feel things have gotten pretty seriously off on the wrong track?

Q5. If the election were held today, would you vote Yes to approve or voting No to reject this measure? (If Undecided: Well, which way do you lean — toward voting Yes to approve or voting No to reject the measure?)



To protect San Francisco Bay for future generations by reducing trash, pollution and harmful toxins, improving water quality, restoring habitat for fish, birds and wildlife, protecting communities from floods, and increasing shoreline public access, shall the San Francisco Bay Restoration Authority authorize a parcel tax of \$12 per year, raising approximately \$25 million annually for 20 years with independent citizen oversight, audits, and all funds staying local?

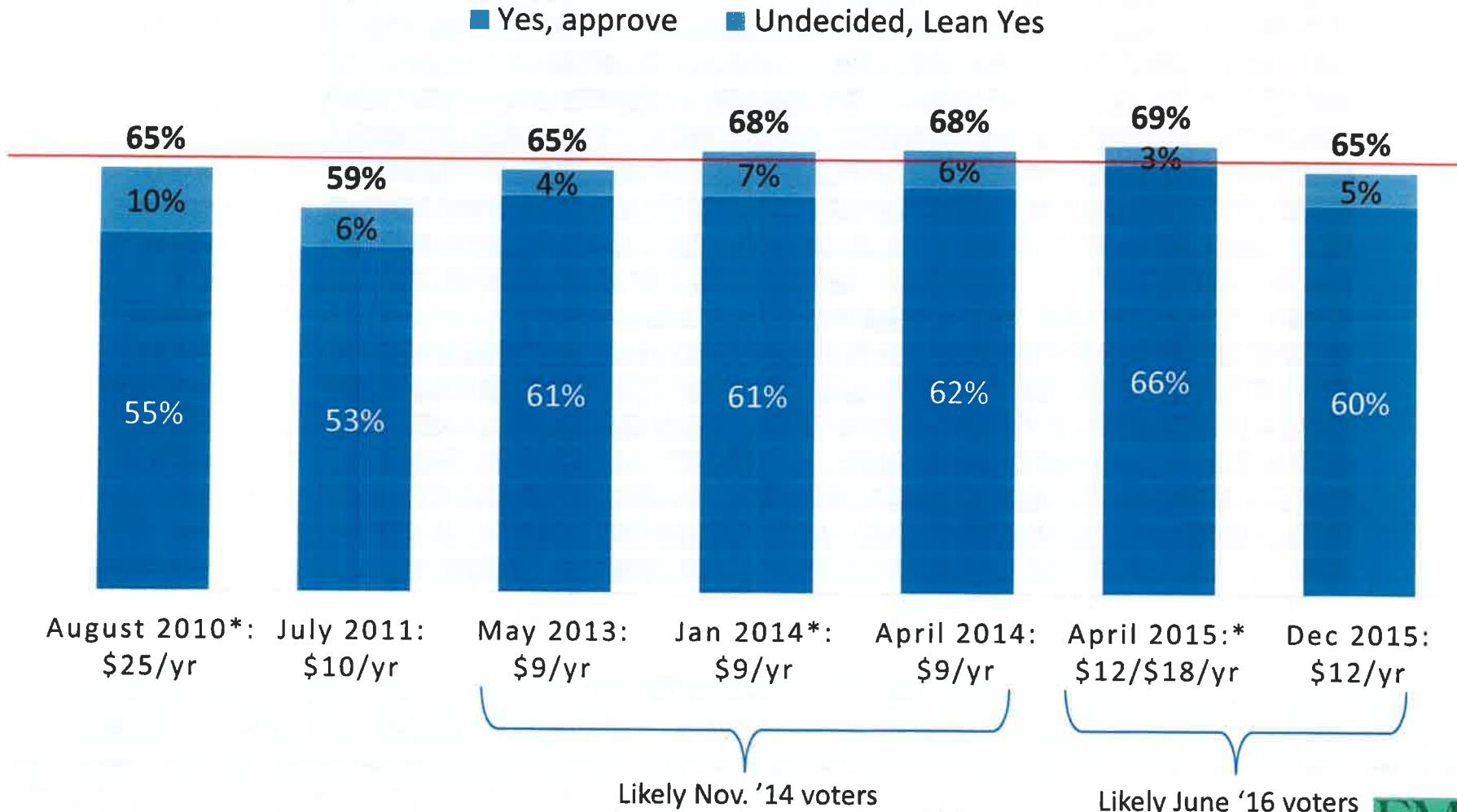
San Francisco Bay Clean Water, Pollution Prevention and Habitat Restoration Program.

Total support falls just shy of 2/3 today.

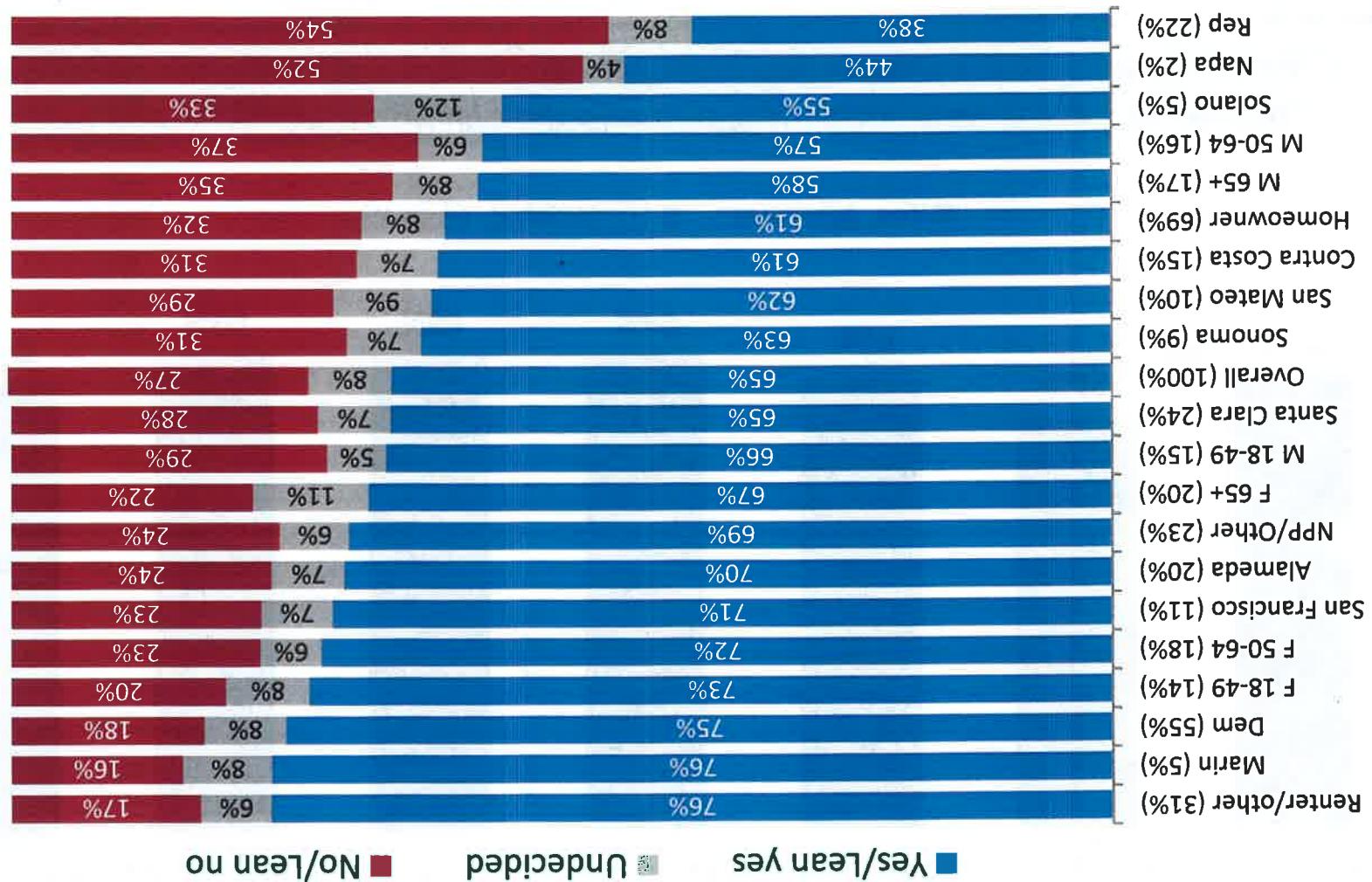
Undecided Vote

Support for SFBRA Measure Over Time

Overall support for a measure has been very consistent over time, despite slight differences in the total amount tested and the election modeled in the poll.



* Poll conducted by FM3; n=600

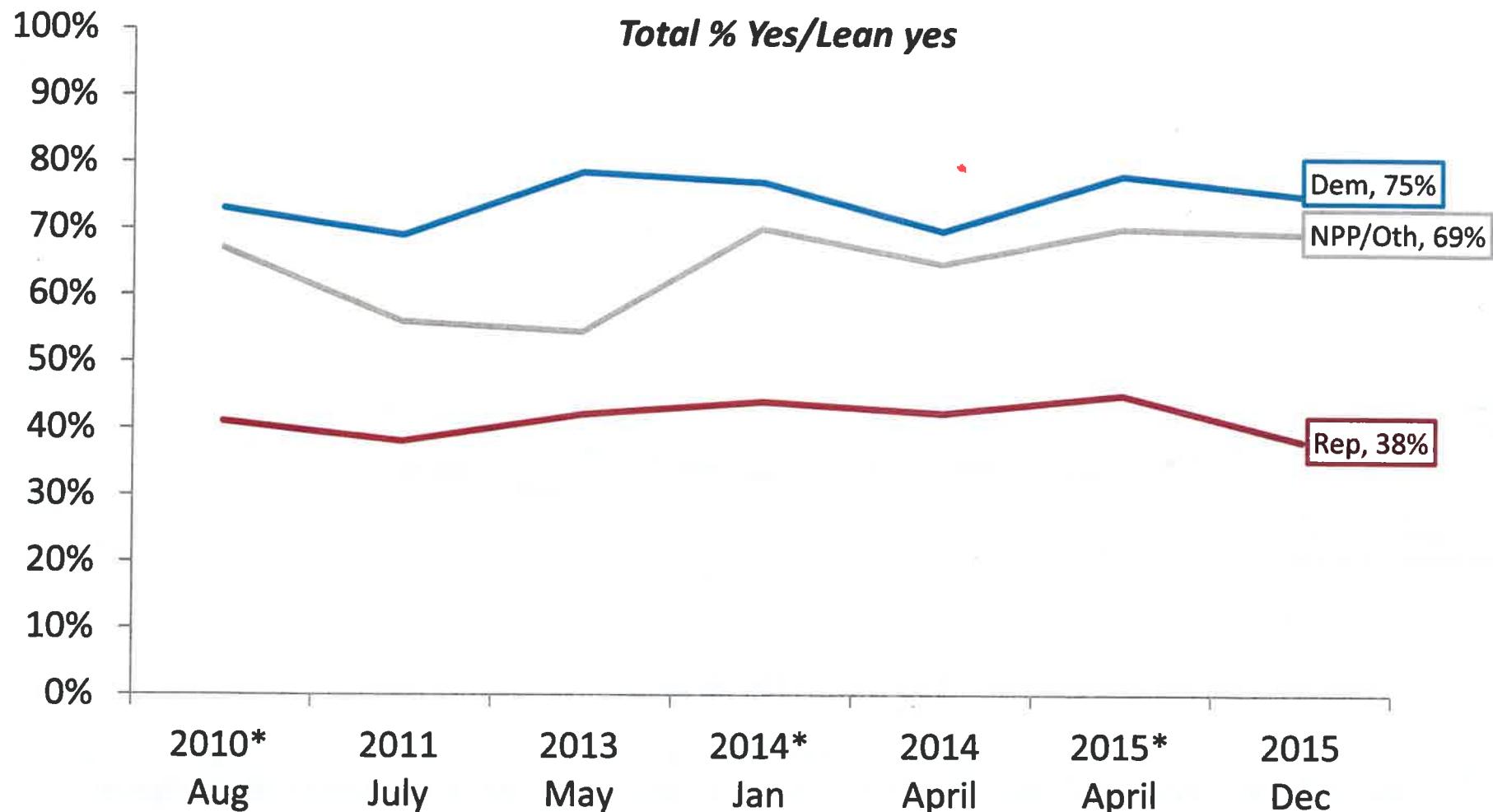


Renters, Democrats, women, and voters in Marin, San Francisco, and Alameda Counties are very

Unaided Vote by Demographics

Unaided Vote by Party

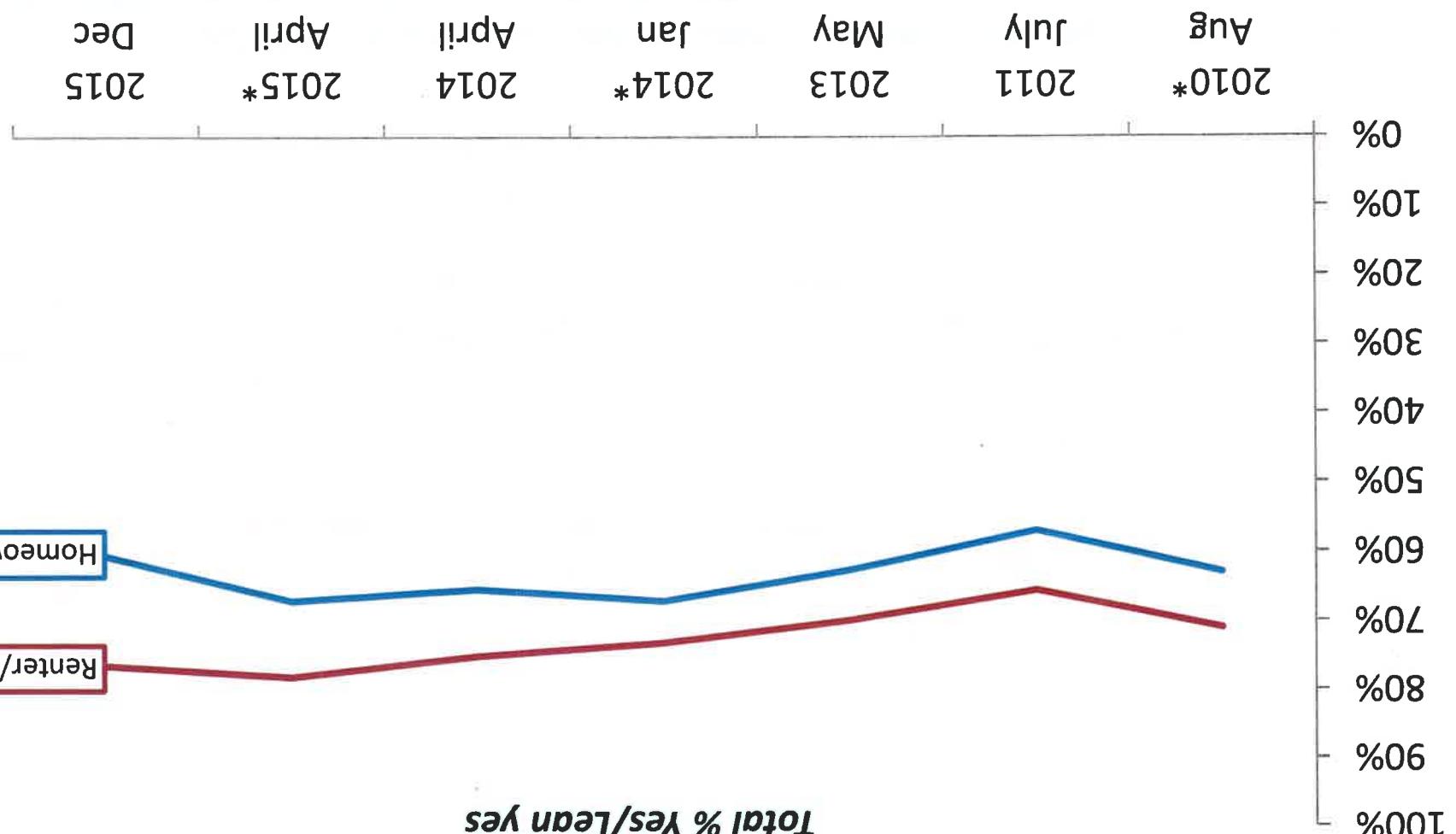
Support among Democrats and Independents remains strong.



Q5. If the election were held today, would you vote Yes to approve or No to reject this measure? (IF Undecided: Well, which way do you lean — toward voting Yes to approve or voting No to reject the measure?) *Poll conducted by FM3



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Total % Yes/Lean Yes

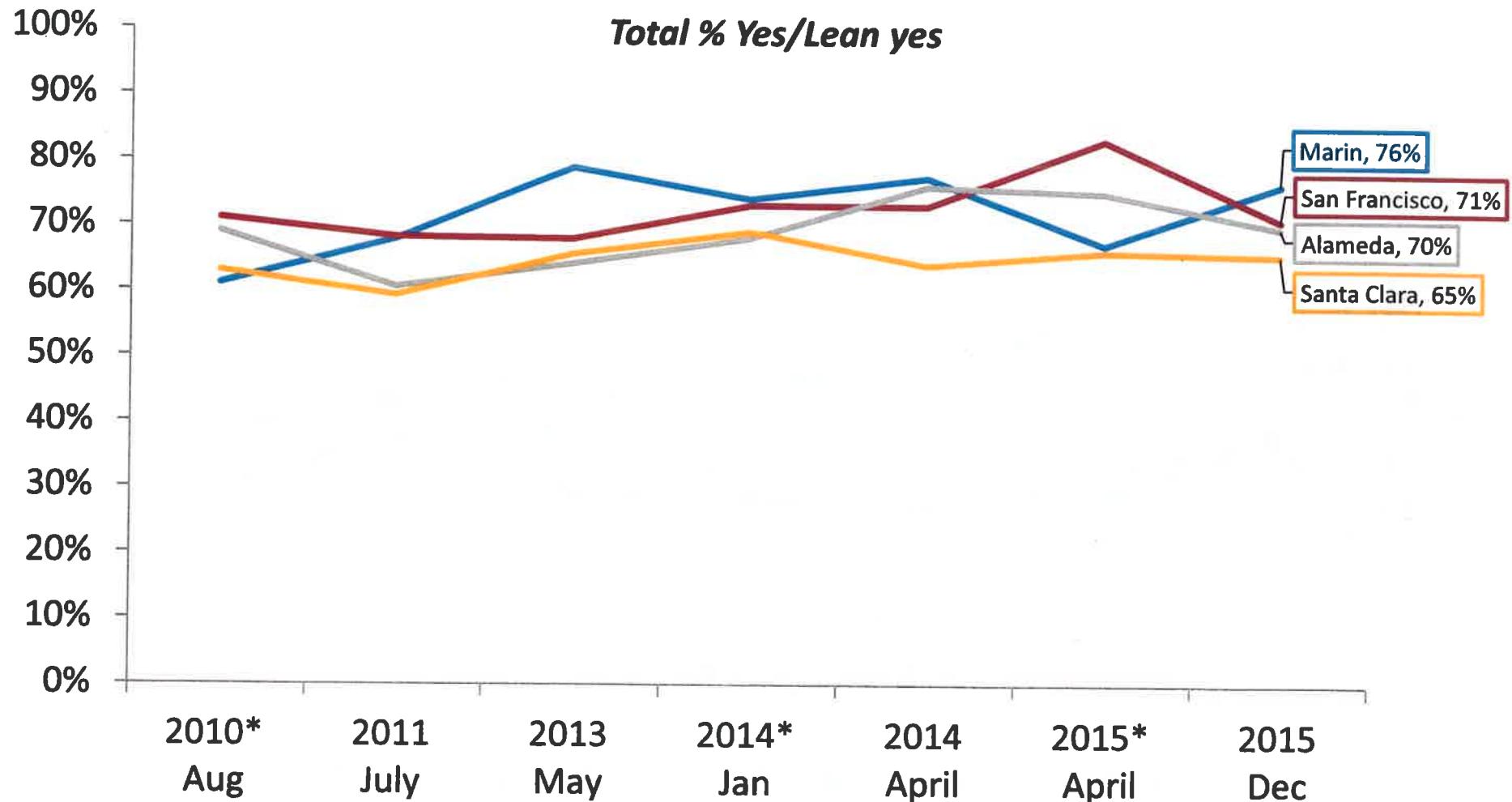
solidified.

Renters have consistently been very supportive, while support among homeowners needs to be

Unaided Vote by Homeowners

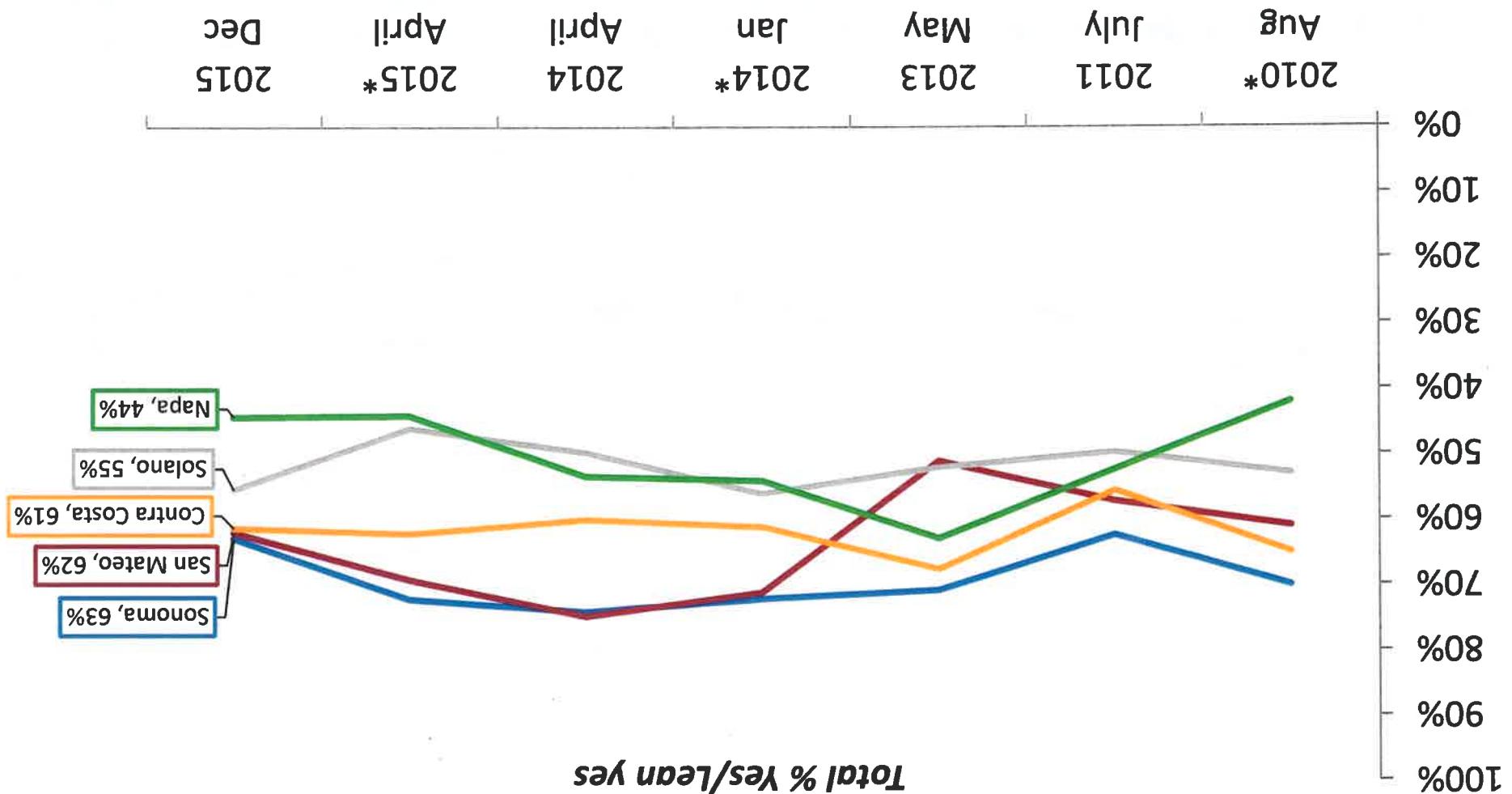
Unaided Vote by County

Support in the largest counties, Santa Clara and Alameda, has been fairly stable over the last year.



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Support in Contra Costa County has been very consistent over time.

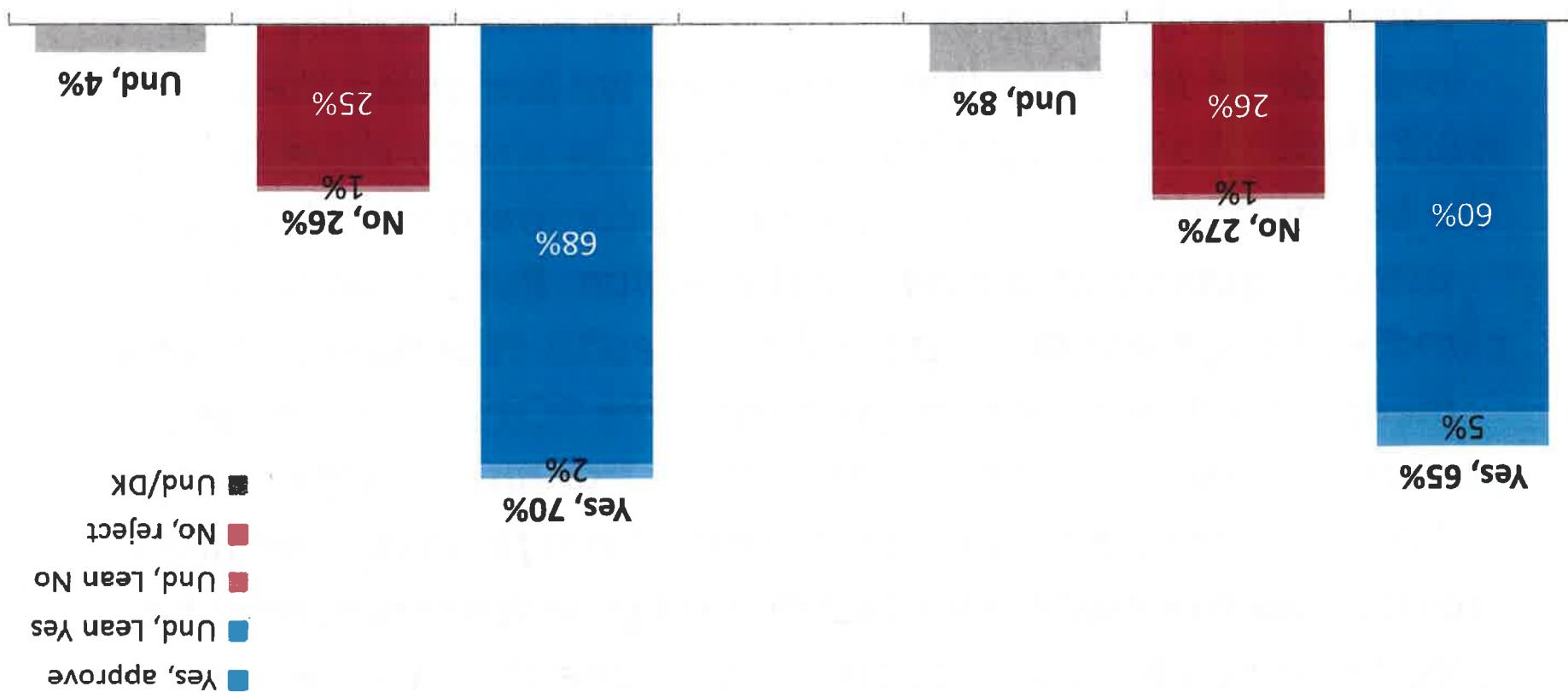
Unaided Vote by County

Positive Messaging

Supporters of this measure say the San Francisco Bay is an important part of our lives – whether we live along the bay; work there; walk or jog along its shores; or simply drive over it. The bay also attracts tourists, supports commercial fishing, and attracts quality employers to the region. But pollution and climate change are putting the Bay's health at serious risk. This measure will reduce harmful toxins like PCB's, mercury and pesticides, restore wetland habitats for fish and wildlife, and fix infrastructure to protect communities from flooding. We need to act now to ensure our children and grandchildren inherit a clean and healthy San Francisco Bay – one that will be part of their lives the way it is part of ours.



Impact of Positive Messaging Vote After Support



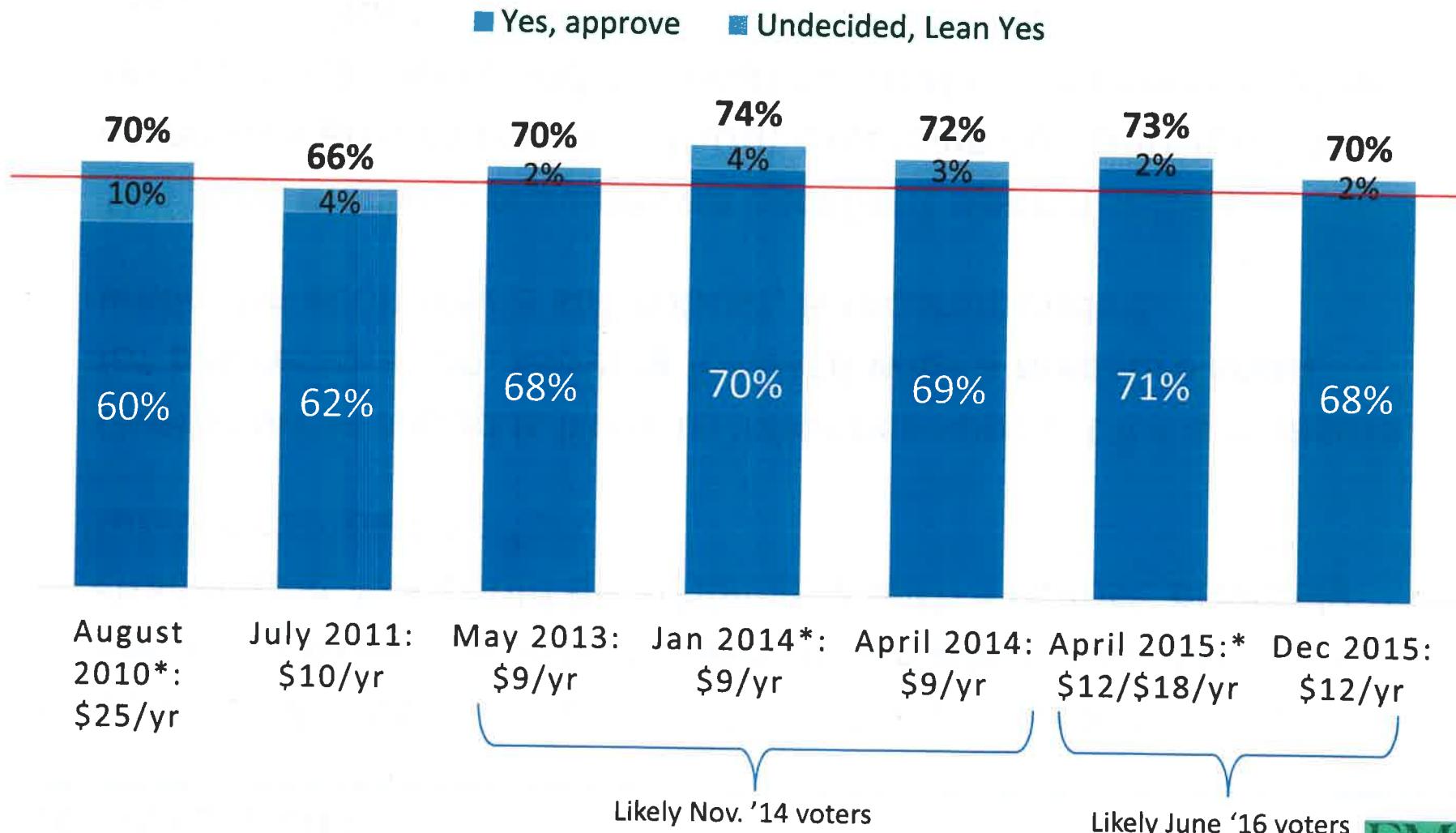
measure.

Overall support moves solidly above 2/3 after a short statement about the benefits of the

Impact of Positive Messaging

Informed Vote – Over Time

Over time, through various polls, we have consistently seen that we can bring support over 2/3 by explaining the benefits of the measure.



* Poll conducted by FM3



- ◀ Consistent with research over time, this poll demonstrates that obtaining supermajority support for a measure will be challenging, but could be achievable with a robust, privately funded campaign effort.
- ◀ Overall voter mood is likely to influence support for a measure for bay restoration. Moving forward with a measure soon, while the economy is still robust, is recommended.
- ◀ The June election provides an excellent opportunity to communicate area-wide without excessive competition from regional, statewide and national political campaigning that will happen in November.

Conclusions

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